

APPENDIX L

HOUSING DATA SUMMARY FORM

and

STRUCTURAL CONDITION SURVEY FORM

HOUSING DATA SUMMARY FORM

Use of this *Housing Data Summary Form* is **required only for APPLICANTS PROPOSING HOUSING REHABILITATION ACTIVITIES.**

As an alternative, applicants proposing housing rehabilitation activities may provide housing condition information from the statewide *Montana Housing Condition Study* (2005). This study evaluates the current housing stock in the state. The detailed data presented on the current housing stock will help the state and community organizations better understand what types of housing are available for rent and for purchase, and assist them in determining the housing needs of Montana citizens. Data regarding the physical characteristics and residential improvements of all residential property was extracted from the Computer Assisted Mass Appraisal System (CAMAS) database maintained by the Montana Department of Revenue (MDOR). Data presented in this report is at the state level. Data for each county and selected municipalities is available in PDF files.

Data from the *Montana Housing Condition Study* can be used in your application -- if it accurately describes the project area. The *Montana Housing Condition Study* is available from the MDOC Housing Division (841-2820) and is on-line at http://housing.mt.gov/Hous_CP_HsgCondStd.asp

Other applicants (i.e., those proposing activities other than housing rehabilitation) may also include provide the Housing Data Summary Form in their application -- if it is applicable to proposed housing activities including homebuyer assistance, new construction, demolition, clearance, floodplain mitigation, and related neighborhood or community revitalization needs.

Also see *Appendix P*, Map Requirements and Resources for Evaluating Local Housing Needs

The Department of Commerce requests that **the housing condition survey data submitted by applicants for CDBG housing projects include the following information only for the proposed project area**, in order to make the data from your local survey clearly applicable to the proposed project.

Note Concerning “Substantially Sub-Standard Units”: Applicants should give special attention to those housing units classified as “substantially or severely substandard.” Because of the increasing costs associates with rehabilitation relative to the overall market value of the home to be assisted, in some cases it may be more cost-effective for the local program to offer an alternative form of assistance to the homeowner, such as voluntary relocation to a home in standard condition and demolition of the substandard unit.

HOUSING DATA SUMMARY FORM

- A. Number of **Project Area** Households: _____
- B. Number and Percent of LMI Households: _____, _____%

C. Number and Percent of Owner-Occupied Housing including:

1. Standard Owner-occupied Housing Units _____, _____%
2. Moderately Substandard Owner-occupied Housing Units _____, _____%
3. Substantially Substandard Owner-occupied Housing Units _____, _____%
4. Severely Substandard Owner-occupied Housing Units _____, _____%
5. If Available, Vacancy Rates for Owner-occupied Housing _____, _____%

D. Number and Percent of Rental Housing Units, including:

1. Standard Rental Housing Units _____, _____%
2. Moderately Substandard Rental Housing Units _____, _____%
3. Substantially Substandard Rental Housing Units _____, _____%
4. Severely Substandard Rental Housing Units _____, _____%
5. If Available, Vacancy Rates for Rental Housing _____, _____%

E. If Available, Number and Percent of the following:

1. Elderly Households (households with at least one person **over 62 years**) _____, _____%
2. Single Parent Head of Households (household composed of dependents and a single parent as major provider) _____, _____%
3. Handicapped Households (households with at least one person with physical or mental handicap) _____, _____%

F. Number and Percent of Structures in the Project Area Appropriate for Demolition:

- a) Residential _____, _____%
- b) Nonresidential _____, _____%

G. Housing Project Budget Calculations:

1. Budgeted Unit Activities:
 - a) Number of Units to be Rehabilitated _____
 - b) Number of Structures to be Demolished _____
2. Budgeted Estimated Rehabilitation Cost per Unit \$ _____
3. Budgeted Admin. & Inspection Cost per Unit \$ _____
4. Budgeted Total Cost (#2 + #3) per Unit \$ _____
5. Local Estimated Rehabilitation Cost:
 - a) Per Owner-occupied Unit \$ _____

b) Per Rental Unit \$_____

H. HUD Lead-Based Paint Requirements (for pre-1978 housing):

1. Number of pre-1978 constructed residential units in project area _____

Note: HUD Lead-Based Paint Requirements:

Applicants considering housing rehabilitation activities should carefully review Appendix I, HUD Lead-Based Paint Requirements.

Budgeted rehabilitation costs presented in G above should reflect lead-based paint remediation and compliance with the new HUD rules.

STRUCTURAL CONDITION SURVEY FORM

This Structural Condition Survey Form provides a range of points for housing defects that when summed indicates the severity of a housing unit's deterioration, if any. This form is also referred to as a "point deduction" survey form. The format is intended for a "windshield" survey of local housing conditions (which does not require inspection of the interior of each housing unit). The consistent use of the point scores provides a mechanism for assessing each property's condition and tentatively classifying its condition as "standard" or "substandard". Substandard units are further classified by the point system as those in need of moderate or substantial rehabilitation, and those which are so severely deteriorated that rehabilitation may not be cost effective and the need for demolition of the unit should be considered.

Applicants should give special attention to those housing units classified as "substantially or severely substandard." Because of the increasing costs associated with rehabilitation relative to the overall market value of the home to be assisted, in some cases it may be more cost-effective for the local program to offer (*rather than housing rehabilitation*) an alternative form of assistance to the homeowner, such as voluntary relocation to a home in standard condition and demolition of the substandard unit.

A. FOUNDATION

- 0 Housing unit has concrete block, concrete, stone or treated wood foundation with only minor cracks or spalling (flaking, chipping or splintering) evident. No severe sagging or other noticeable support defects.
- 2 Foundation has holes in a few places, major cracks or spalling evident. Severe sagging or other major support defects.
- 6 Housing unit has some sections of main living areas which do not have an approved foundation, or has major holes in the foundation providing little protection from elements (rain, snow).

B. WALLS / PORCHES / STAIRS

- 0 Exterior walls, porches or stairs in good shape (effective protection from elements).
- 2 Some porches or stairs out of alignment, sagging, or buckling outward. Siding loose; paint chipping or worn away in major areas. Mortar decomposing in brick or stone structures. Stucco or plaster badly cracked.
- 6 Some exterior walls, porches or stairs badly aligned, sagging, or with holes. Siding missing, or building materials in advance stages of deterioration. Mortar missing, bricks or stones loose or missing. Stucco or plaster missing or badly spalling.

C. WINDOWS / DOORS

- 0 Exterior window and door features in good shape.
- 2 Exterior windows and doors need minor caulking or repairs or storm windows. Existing storm windows in deteriorated condition. Window panes cracked; single glazing or plastic vinyl weatherizing.
- 6 Exterior windows and doors broken, large cracks, holes, missing parts; needs major repair.

D. ROOF

- 0 Roof line straight with no sagging evident. Roofing materials in good shape.
- 2 Roof line slightly sagging. Roofing materials loose, few missing shingles or portions loose or missing.
- 6 Roof line sags extensively. Roofing materials missing, holes evident, flashing missing or rusted through.

E. CHIMNEY / VENTS

- 0 Chimney/vents in good shape; chimney adequately projects above roof (3 ft. or more).

- _____ 2 Metal chimney/vents out of alignment, some rusting or evidence of deterioration. Evidence of loose bricks or deterioration of mortar in masonry chimney.
- _____ 6 Chimney/vents in need of major repairs or replacement; vents missing.

F. ELECTRICITY Current state standards for electrical service require:

1. Proper weather protection at entry to the housing unit which includes a weather cap on top of a conduit mast.
2. Attached to the base of the conduit mast a large square meter base, with the meter mounted on it.
3. An 8-foot ground rod from the bottom of the meter base to the ground.

- _____ 0 Adequate service: Wires to unit appear to be of good quality and condition. Weather protection at entry, meter mounted to meter base. Proper grounding.
- _____ 2 Questionable service: Wires to unit appear to be worn. Deteriorated weather protection and/or meter base. Inadequate grounding.
- _____ 6 Inadequate service: No electricity to housing unit. Hazardous wires to unit. No weather protection or meter base. No grounding evident.

_____ **TOTAL POINTS** (A through F)

Point Detraction Guidelines

0 - 7 points: **STANDARD** -- Housing unit appears to be in acceptable condition.

8 -15 points: **MODERATELY SUBSTANDARD** -- Unit needs moderate repair and rehabilitation appears appropriate.

16 - 23 points: **SUBSTANTIALLY SUBSTANDARD** -- Unit appears to need substantial repair. (Rehabilitation may not be cost-effective. Alternative forms of assistance may be more appropriate.)

24+ points: **SEVERELY SUBSTANDARD** -- Unit appears dilapidated. Demolition and housing replacement should be considered.

Type of structure: Single family, detached _____

Duplex _____

Other (specify) _____

Address of housing unit:

Date Surveyed: _____

Surveyor: _____

As an alternative to reprinting a number of survey forms, the person conducting the survey may record the points for each category and the total score, along with the type of structure and the address of the housing unit on a 3 x 5 inch index card. When paired with data from a local household income survey, the card could also be used to note whether the household would or would not be eligible for assistance.